

Quality Assurance Review Instructions

1. Area office lead team staff, on a monthly basis, randomly selects and reviews 1 – 3 charts of each case manager. Random samples are computer generated.
2. Number of charts reviewed is based on case load of case manager: less than 50 cases = 1 chart; 50 – 69 cases = 2 charts; 70 cases or more = 3 charts. Exceptions exist based on length of case management in CLTC and exemplary quality assurance review scores.
3. New case manager charts are only included in the random sample pool after three months of case management activities.
4. Chart reviews are conducted on each waiver program (Community Choices and HIV/AIDS) and covers each type of monthly activity (monthly contacts, quarterly visits and re-evaluation visits). Chart reviews include active and inactive cases.
5. The results of each chart review are recorded on a quality assurance review form, which is an Excel file. As each question on the tool is addressed, it is automatically scored.
6. Completed monthly quality assurance review tools are discussed with case managers, and any problems are discussed with appropriate parties.
7. Completed monthly quality assurance review tools are submitted to Central Office.

NOTE: A case manager may have more than the above stated number of charts reviewed by Central Office or Area Office, if deemed necessary.